

ARIZONA TOURISM INDICATORS

A QUARTERLY NEWSLETTER OF RESEARCH AND STRATEGIC PLANNING

4TH QTR
2007



ARIZONA TOURISM INDICATORS

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SPRING BREAK TRAVEL OUTLOOK FINDS 29% PLAN TO TRAVEL

A cold winter in much of the country is sparking interest in trips to warmer climates and despite some economic slowing, travelers should prepare for spring break crowds along with higher airfares, especially for flights to the most popular destinations including Florida, Las Vegas and Mexico.

The spring break travel season is shorter this year than usual, just four peak weeks (roughly March 1-31) instead of the normal six, which could result in a higher concentration of

travelers over a shorter period of time. Unlike recent years, "family" spring break (when K-12 kids are out of school) and "student" spring break (when most college students are out of school) occur simultaneously this year.

The season begins March 1, but the largest crowds will likely be found during the week prior to Easter (March 16-23) when most college students AND families with kids take to the roads and skies. Also adding to increased volume that week are St. Patrick's Day on Monday, March 17 and Easter on Sunday, March 23. Volumes will likely begin to dwindle following Easter and the peak spring break season will mostly subside by Monday, April 7.

Large crowds mean high demand, and high demand along with higher fuel costs is translating into higher airfares to the top 10 most popular spring destinations, which are up an average of 11 percent this March compared to March 2007 according to Expedia® data.

However, when demand falls in April, airfares to these destinations are expected to be up approximately two percent on average compared to April 2007. More Expedia travelers are headed to Florida cities for spring break this year than last with Ft. Myers and Tampa/St. Petersburg moving into the top 10 along with perennially popular Ft. Lauderdale, Orlando and Miami. Destinations with fewer expected travelers this spring compared to last spring include: New York, Jamaica, San Francisco and San Diego.

Source: Expedia Travel Trendwatch

Tour Participants Want More Action

An informal tour operators poll shows Americans are looking for more action while on vacation. Nearly two out of three tour operators said adventure travel is on the rise, according to the U.S. Tour Operators Association (USTOA).

"Results were mixed when it comes to 'slow travel,' meaning stay-put vacations or tours taking more time to cover an area or visiting an area more in depth," said USTOA.

More than 50% of respondents cited year over year growth, but more than one third also reported no growth in this area. The increased interest in active vacations was reflected in the types of packaged vacations being booked.

"In what may reflect a slight maturing of the market, while more than 50% reported growth in independent packages (usually prepackaged hotel and other arrangements), a full third said there had been no change in this category," said USTOA.

Previous research indicated that baby boomers are fueling the growth in active vacations, according to Bob Whitley, USTOA president.

Source: TravelMole

BREAK AWAY THIS SPRING! ORBITZ PROFILES ALTERNATIVE SPRING BREAK DESTINATIONS FOR TRAVELERS LOOKING BEYOND THE PARTY SCENE

March is the official kickoff to spring and every year college revelers hit the beaches, making it somewhat challenging for families and others seeking tranquility to find a relaxing vacation spot. Orbitz (www.orbitz.com), furthering its commitment to keep travelers "A Step Ahead™," is for the third straight year using its Insider Index to identify some choice alternative spring break destinations for those looking to avoid the partiers and the big crowds.

"Spring break may be synonymous with college kids and party scenes, but there's also a large segment of the market that is traveling with younger kids on break, as

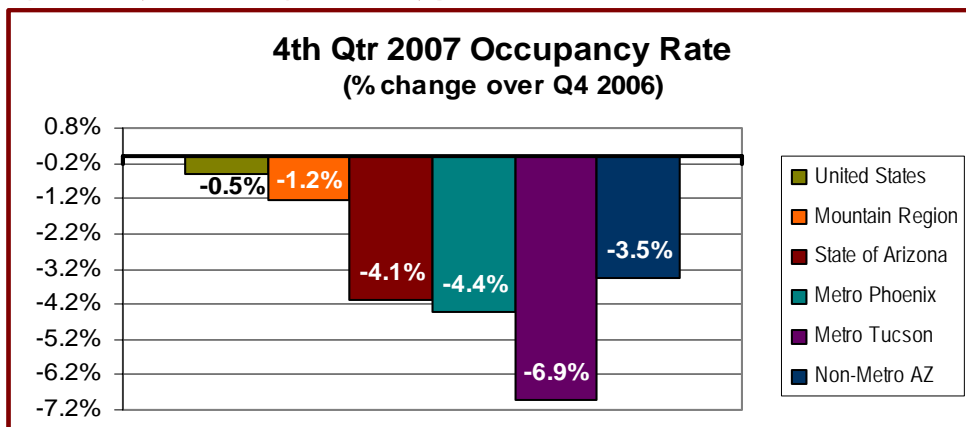
well as those going spring skiing or simply looking to escape the cold," said Heather Leisman, Senior Director of Merchandising at Orbitz. "Our Insiders have picked some great places to avoid the crowds and enjoy a memorable vacation."

To help travelers plan a getaway this spring, Orbitz is highlighting the top alternative spring break destinations. The Index represents the most popular locations where Orbitz travelers are heading in during this popular travel period, excluding destinations that are traditionally visited by college spring breakers.

Top 10 Alternative Spring Break Destinations	
1	San Francisco, CA
2	Puerto Vallarta, Mexico
3	San Diego, SC
4	San Juan, Puerto Rico
5	San Antonio, TX
6	Tampa, FL
7	Seattle, WA
8	Reno, NV
9	Austin, TX
10	Tucson, AZ

Source: Orbitz.com. Destinations based on popularity for arrival 3/1/08 to 4/15/08. Rank based only on 20 nominated alternative spring break destinations. Data includes land-only and package sales. Based on net sales as of 2/6/08.

LODGING PERFORMANCE



Source: Smith Travel Research

NATIONAL

The lodging sector nationally saw a small increase of 1.3% in demand as well as a 1.8% increase in supply while occupancy remained slightly down (-0.5%) during the fourth quarter compared to the same quarter in 2006, according to Smith Travel Research. The increase in the Average Daily Rate (ADR) was the driver of the increase in the Revenue per Available Room (RevPAR) during the fourth quarter.

ADR grew 6.2% to a rate of \$104.75. RevPAR increased 5.7% to a rate of \$60.61 compared to Q4 2006.

MOUNTAIN REGION

The Mountain Region, as defined by the US Census Bureau, witnessed a decrease in occupancy of -1.2%, down to 59.3%, in the fourth quarter over the same period in 2006. ADR was the primary driver to the increase in RevPAR during the fourth quarter. ADR

grew 3.8% to a rate of \$97.35. RevPAR increased 2.5% to a rate of \$57.72 compared to Q4 2006.

ARIZONA

Arizona's lodging occupancy during the fourth quarter decreased, down -4.1% to a rate of 60.8%. Demand for lodging in the state also decreased -2.3% during the quarter, equivalent to a 132,772 room decrease. ADR increased 4.9% to a rate of \$103.26. The increase in ADR drove RevPAR up 0.6% to \$62.82 for the state during the fourth quarter.

METRO PHOENIX

Metro Phoenix's average occupancy rate during the fourth quarter was down -4.4% over last year with an average rate of 62.7%. Demand for lodging in the Metro Phoenix area decreased -2.8%, which is approximately 87,982 less rooms. The average ADR for Metro Phoenix during the fourth quarter was \$118.55, an increase of 4.3% over Q4 2006. The decrease in occupancy

LODGING PERFORMANCE

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drove the decrease in RevPAR, which was \$74.29, a decrease of -0.3% during the fourth quarter.

METRO TUCSON

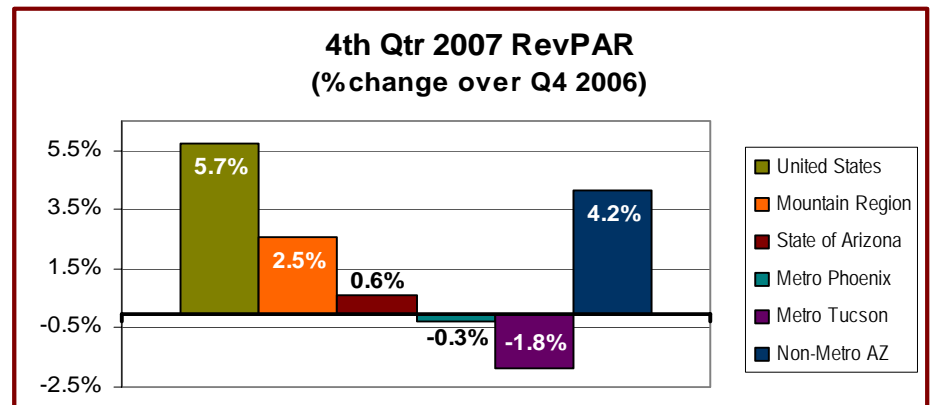
Metro Tucson's average occupancy rate decreased -6.9% to a rate of 61.1% during the fourth quarter. Demand for Metro Tucson decreased -5.1%, equivalent to 46,415 less rooms. The average daily rate for Metro Tucson during the fourth quarter was \$97.47, an increase of 5.5% over Q4 2006. The decrease in occupancy drove the slight decrease in RevPAR, which was \$59.52, a decrease of -1.8% during the fourth quarter.

COUNTY

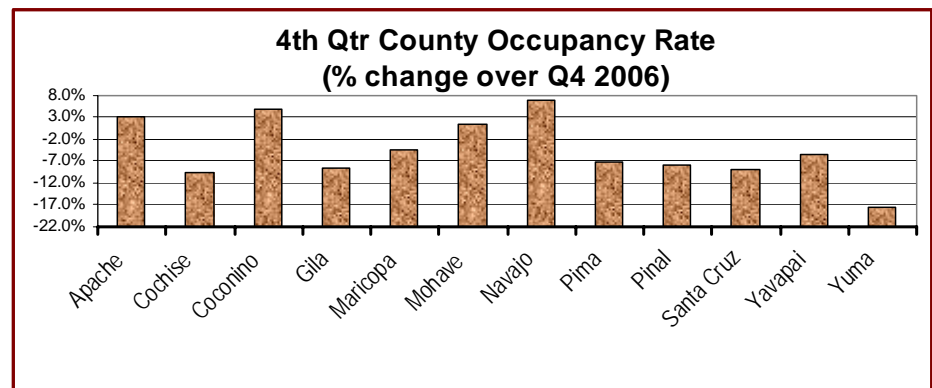
Lodging indicators for Arizona's counties left much to be desired during the fourth quarter. The following counties stand out the most during this quarter: Cochise, Navajo, Pinal, and Yuma for reasons outlined below.

Lodging in Cochise County witnessed a decrease in occupancy during the fourth quarter, down -9.7% to a rate of 61.8%. This decrease was due to an increase in rooms supplied at 10.8% which accounts for 24,706 more rooms. Decreases in occupancy and increases ADR contributed to an increase in RevPAR for the county. Cochise County's average RevPAR rate during the fourth quarter was \$40.84, an increase of 1.7%.

Navajo County experienced strong growth during the fourth quarter compared to Q4 2006. Room demand was up 6.9% during the period, which accounts for an increase of 12,146 rooms. Increases in both occupancy and ADR contributed to an increase in RevPAR for the county. The average



Source: Smith Travel Research



Source: Smith Travel Research

RevPAR rate was \$34.82, up 13.5% compared to the same period last year.

In Pinal County, occupancy decreased -7.9%, to a rate of 60.3% during the fourth quarter. Decreased room demand, down -7.4%, or 6,550 rooms, and flat room supply contributed to the decreased hotel occupancy rate. Pinal County's ADR for the quarter was \$72.11, up 3.0%. The decrease in occupancy contributed to the decrease in the average RevPAR rate for the quarter, which was \$43.45, down -5.1% compared to Q4 2006.

Yuma County's occupancy rate decreased -17.5% to a rate of 61.3% during the fourth quarter. This was

due to an -8.1% decrease in room demand in Yuma County as well as a supply increase of 11.8%, approximately 28,866 more rooms. The decrease in occupancy contributed to the decrease in RevPAR for the county. The average RevPAR rate was \$46.31, down -14.7% compared to Q4 2006. ADR was up 3.3% to \$75.55 for the quarter.

In addition, Apache and Navajo counties continued to see positive increases in occupancy during all four quarters of 2007. Counties that witnessed a decline in RevPAR for the quarter included Maricopa, Pima, Pinal, Santa Cruz, and Yuma counties.

LODGING PERFORMANCE

LODGING PERFORMANCE 4TH QUARTER 2007

	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2007	% Change	2007	% Change	2007	% Change	2007	% Change	2007	% Change
United States	57.9%	-0.5%	104.75	6.2%	60.61	5.7%	238,903,957	1.3%	412,914,327	1.8%
Mountain Region	59.3%	-1.2%	97.35	3.8%	57.72	2.5%	28,823,457	0.0%	48,618,625	1.2%
Arizona	60.8%	-4.1%	103.26	4.9%	62.82	0.6%	5,636,353	-2.3%	9,265,182	1.8%
Metro Phoenix	62.7%	-4.4%	118.55	4.3%	74.29	-0.3%	3,056,249	-2.8%	4,877,084	1.7%
Metro Tucson	61.1%	-6.9%	97.47	5.5%	59.52	-1.8%	869,493	-5.1%	1,423,851	2.0%
Non-Metro Arizona	58.6%	-3.5%	79.37	7.9%	46.49	4.2%	1,626,048	-1.0%	2,775,832	2.5%

Source: Smith Travel Research

COUNTY LODGING PERFORMANCE 4TH QUARTER 2007

County	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2007	% Change	2007	% Change	2007	% Change	2007	% Change	2007	% Change
Apache	54.5%	3.1%	69.38	11.8%	37.80	15.1%	49,722	3.7%	91,264	0.5%
Cochise	61.8%	-9.7%	66.08	12.6%	40.84	1.7%	156,471	0.0%	253,142	10.8%
Coconino	56.0%	4.8%	75.35	8.7%	42.17	13.9%	530,577	4.4%	948,044	-0.4%
Gila	58.3%	-8.5%	72.25	9.6%	42.11	0.3%	57,608	-8.5%	98,838	0.0%
Graham	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Greenlee	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
La Paz	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Maricopa	62.7%	-4.4%	119.81	4.1%	75.16	-0.5%	2,975,496	-2.8%	4,743,071	1.7%
Mohave	51.5%	1.4%	68.00	-0.6%	35.01	0.8%	201,233	1.0%	390,815	-0.5%
Navajo	59.2%	6.8%	58.83	6.2%	34.82	13.5%	176,260	6.9%	297,833	0.0%
Pima	61.1%	-7.1%	97.47	4.9%	59.52	-2.4%	869,493	-5.3%	1,423,851	2.0%
Pinal	60.3%	-7.9%	72.11	3.0%	43.45	-5.1%	80,753	-7.4%	134,013	0.5%
Santa Cruz	60.8%	-8.8%	73.16	5.6%	44.48	-3.7%	53,634	-8.8%	88,228	0.0%
Yavapai	60.0%	-5.3%	124.98	10.1%	74.97	4.2%	254,843	-3.2%	424,855	2.3%
Yuma	61.3%	-17.5%	75.55	3.3%	46.31	-14.7%	168,199	-8.1%	274,414	11.8%

Source: Smith Travel Research

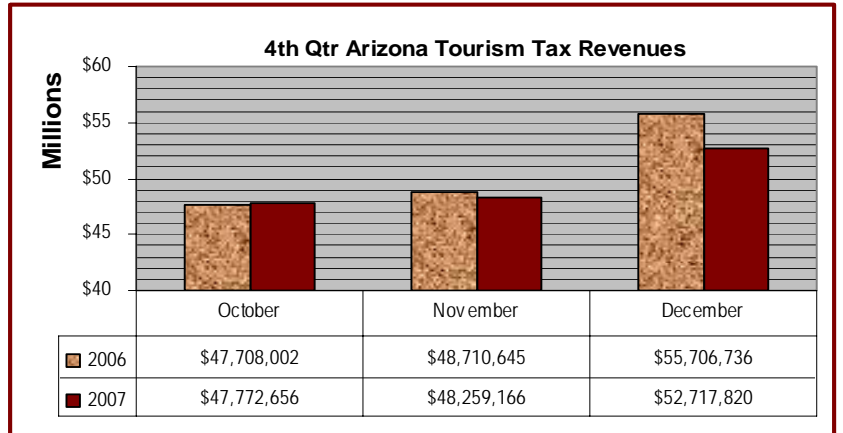
AZ TOURISM RELATED TAX

During the 4th quarter of 2007, travelers generated tax revenue in the tourism sectors of lodging, restaurant/bar, retail, and amusements totalling approximately \$148 million, a -2.2% decrease over the same period last year. Visitor generated revenues were up in lodging and amusements. During the 3rd quarter of 2007, the lodging sector increased 0.6% to almost \$29.7 million dollars, the retail sector decreased -2.3%, the restaurant/bar sector was down -4.7% while the amusement sector was up 2.6% compared to the same period last year. During the 4th quarter of 2007, the most travel related tax revenues were generated in the month of December, down -5.4% while October was the most improved (up 0.1%) for the same period last year.

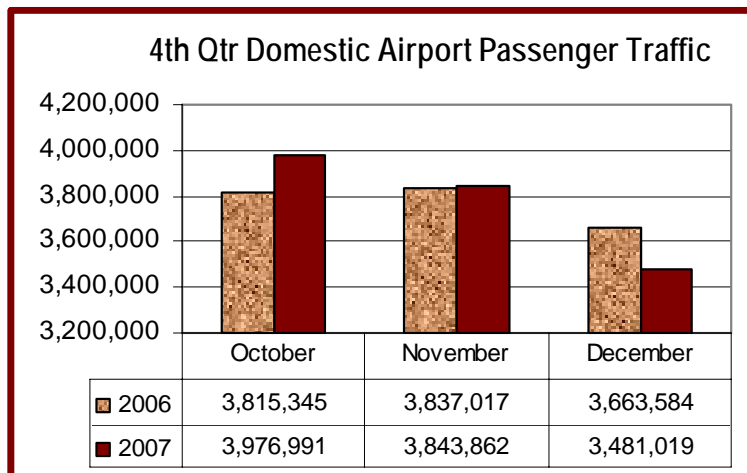
Tourism sectors as defined by the Tourism Economic Impact Model (TEIM) developed by the Travel Industry Association of America, and adapted for Arizona by Northern Arizona University, include: lodging, restaurant/bar, retail, and amusements. TEIM model produced the following percentages, which are used to figure gross sales attributable to tourism: lodging (95%), restaurant/bar (23.62%), retail (10.91%), and amusements (6.43%). Source: Arizona Department of Revenue, NAU

AZ TOURISM RELATED TAX REVENUES-4TH QTR

Tourism Sectors	2007	2006	% Change
Lodging	\$29,698,316	\$29,524,410	0.6%
Restaurant/Bar	\$31,271,858	\$32,830,717	-4.7%
Retail	\$86,912,963	\$88,925,302	-2.3%
Amusement	\$866,505	\$844,954	2.6%
4th Quarter Total	\$148,749,642	\$152,125,383	-2.2%



ARIZONA AIRPORT PASSENGER TRAFFIC



Airport passenger traffic from the five tracked Arizona airports was essentially flat during the fourth quarter, an increase of only 1,428. The positive trend in passenger traffic has continued since the first quarter of 2007. The highest volume of airport passenger traffic was recorded in the month of October, with approximately 4.1 million passengers, an increase of 4.1% over the same month last year. December witnessed a decline of -4.3% in passenger traffic while November remained flat compared to the same months in 2006.

Two of the five tracked Arizona airports experienced an increase in passenger traffic in Q4. Tucson International, posted an increase, up 5.3% over the same period last year as well as Yuma International with an increase of 13.2%. Phoenix Sky Harbor passenger traffic declined -0.5% in the quarter as well as Flagstaff Pulliam and Grand Canyon National Park Airport with -2.2% and -4.6% declines respectively for the quarter. International passenger traffic to Arizona increased this quarter, posting a 3.7% increase during Q4, an increase of 15,502 passengers.

Airports	2006	2007	% Change
Flagstaff Pulliam	21,213	20,744	-2.2%
Grand Canyon National Park	151,880	144,823	-4.6%
Phoenix Sky Harbor	10,457,508	10,405,413	-0.5%
Tucson International	1,072,867	1,129,337	5.3%
Yuma International	34,719	39,298	13.2%
4th Quarter Total	11,738,187	11,739,615	0.0%

Source: Activity reports provided by airports

AZ STATE PARK VISITATION

Top Visited State Parks in Q4 were:

1. Catalina SP	42,188
2. Kartchner Caverns SP	36,681
3. Dead Horse Ranch SP	31,524
4. Slide Rock SP	28,389
5. Patagonia Lake SP	26,312

Visitation to Arizona's State Parks decreased -1.6% during the fourth quarter to 411,373 visitors. Decreased visitation of -3.9% and -1.6% respectively for November & December contributed to the quarterly decrease compared to the same period last year. The most improved park in the state park system was McFarland State Historic Park with 218.1% increase in visitation.

NORTHERN In the northern Arizona, Fool Hollow Lake had an increase of 40.4% in the fourth quarter. The most visited park in the region, Dead Horse Ranch, witnessed a 20.2% increase in visitation. Another well visited park, Slide Rock, experienced a -2.8% decline to 28,389 visitors for the quarter. The region's visitation decreased -5.0% in Q4 when compared to Q4 2006.

WESTERN Overall, the western region of the state had a decrease of -18.9% in visitation. Lake Havasu, the most visited park in the region, experienced a -44.2% decline down to 22,751 visitors. Some of the decline can be attributed to campgrounds being closed during December. In contrast, Yuma Territorial Prison visitation increased 19.3% to 14,536 in the fourth quarter.

SOUTHERN Positive visitation from Catalina SP (4.1%), Patagonia Lake (5.6%), and Roper Lake (25.2%) contributed to the increase of 1.1% for the Southern Region. This increase was dampened slightly by declines in visitation at Boyce Thompson Arboretum (-11.7%) and Tombstone Courthouse (-14.5%).

AZ STATE PARKS MONTHLY VISITATION—4TH QUARTER

	2006	2007	% Change
October	171,139	171,649	0.3%
November	149,157	143,293	-3.9%
December	97,952	96,431	-1.6%
Fourth Quarter	418,248	411,373	-1.6%

Source: Arizona State Parks

ARIZONA STATE PARKS VISITATION—4TH QUARTER

Park	2006	2007	% Change
W Alamo Lake SP	12,334	12,810	3.9%
S Boyce Thompson Arboretum SP	18,022	15,906	-11.7%
W Buckskin Mountain SP	16,823	16,405	-2.5%
S Catalina SP	40,535	42,188	4.1%
W Cattail Cove SP	16,429	12,974	-21.0%
N Dead Horse Ranch SP	26,221	31,524	20.2%
N Fool Hollow Lake RA	9,097	12,771	40.4%
N Fort Verde SHP	3,954	3,458	-12.5%
N Homolovi Ruins SP	2,853	3,237	13.5%
N Jerome SHP	12,515	12,798	2.3%
S Kartchner Caverns SP	36,817	36,681	-0.4%
W Lake Havasu SP	40,777	22,751	-44.2%
S Lost Dutchman SP	21,403	21,463	0.3%
N Lyman Lake SP	2,934	3,933	34.0%
S McFarland SHP	431	1,371	218.1%
S Oracle SP	2,993	3,118	4.2%
S Patagonia Lake SP	24,906	26,312	5.6%
S Picacho Peak SP	14,883	14,783	-0.7%
N Red Rock SP	18,274	17,600	-3.7%
N Riordan Mansion SHP	5,697	6,148	7.9%
S Roper Lake SP	10,940	13,700	25.2%
S San Rafael SNA	0	0	0.0%
N Slide Rock SP	29,192	28,389	-2.8%
S Tombstone Courthouse SHP	12,792	10,943	-14.5%
N Tonto Natural Bridge SP	17,172	18,500	7.7%
S Tubac Presidio SHP	4,308	3,540	-17.8%
W Yuma Crossing SHP	3,763	3,534	-6.1%
W Yuma Territorial Prison SHP	12,183	14,536	19.3%
Total	418,248	411,373	-1.6%

Source: Arizona State Parks

SP: State Park SHP: State Historic Park RA: Recreation Area SNA: State Natural Area

*Regions as defined by Arizona State Parks

Northern Region (N); Southern Region (S); West Region (W)

AZ NATIONAL PARK VISITATION

Top Visited National Parks in Q4 were:

1. Grand Canyon NP	786,656
2. Lake Mead NRA	210,486
3. Glen Canyon NRA	196,215
4. Saguaro NP	159,755
5. Canyon de Chelly NM	144,643

ALL ARIZONA NATIONAL PARKS VISITATION

4TH QUARTER 2007

	2006	2007	% Change
October	833,659	897,004	7.6%
November	632,452	632,572	0.0%
December	505,331	521,168	3.1%
Quarter Total	1,971,442	2,050,744	4.0%

Source: National Park Service

ARIZONA NATIONAL PARKS VISITATION—4TH QUARTER

Park	2006	2007	% Change
Canyon de Chelly NM	144,415	144,643	0.2%
Casa Grande NM	18,179	14,768	-18.8%
Chiricahua NM	13,320	12,905	-3.1%
Coronado NM	14,153	13,112	-7.4%
Fort Bowie NHS	2,491	2,385	-4.3%
Glen Canyon NRA	135,226	196,215	45.1%
Grand Canyon NP	775,176	786,656	1.5%
Hubbell Trading Post NHS	9,665	9,979	3.2%
Lake Mead NRA	222,260	210,486	-5.3%
Montezuma Castle NM	134,595	129,050	-4.1%
Navajo NM	11,449	11,667	1.9%
Organ Pipe Cactus NM	76,295	89,127	16.8%
Petrified Forest NP	97,142	96,693	-0.5%
Pipe Spring NM	8,950	8,477	-5.3%
Saguaro NP	140,840	159,755	13.4%
Sunset Crater Volcano NM	45,567	49,406	8.4%
Tonto NM	14,064	10,419	-25.9%
Tumacacori NHP	15,537	16,194	4.2%
Tuzigoot NM	25,164	24,050	-4.4%
Walnut Canyon NM	24,635	24,351	-1.2%
Wupatki NM	42,319	40,406	-4.5%
Total	1,971,442	2,050,744	4.0%

Source: National Park Service

NP: National Park

NM: National Monument

NHS: National Historic Site

NRA: National Recreation Area

NHP: National Historic Park

There was an increase in recreational visitation to Arizona's National Parks during the 4th quarter of 2007. Nearly 2.1 million people visited Arizona's National Parks, which is up 4.0% compared to the same period last year. October proved to be the best performing month with an increase of 7.6%.

Of the 21 Arizona National Parks, 9 saw an increase in visitation. The top performer was Glen Canyon NRA, up 45.1% to 196,215 visitors during the 4th quarter. This was followed by Organ Pipe Cactus NM, which welcomed 89,127 visitors, up 16.8%. Saguaro NP witnessed an increase of 13.4% to 159,755 visitors, regaining its visitation from a decline in 2006 due to road construction/closures. Sunset Crater Volcano NM outperformed last year's visitation by 8.4%, up to 49,406 visitors in the 4th quarter. Grand Canyon National Park visitation increased 1.5% to 786,656 for the quarter.

In contrast, Tonto NM experienced the largest decline in visitation, down -25.9% to 10,419 visitors during the fourth quarter due to low lake levels early in the quarter and significant increases rain later. Visitation to Casa Grande NM decreased -18.8% to 14,768 visitors for the fourth quarter. Coronado NM visitation declined -7.4% to 13,112 due to road closures. Lake Mead NRA experienced a decline of -5.3% down to 210,486 visitors for the quarter.

ARIZONA OFFICE OF TOURISM

1110 W. Washington St., Suite 155
Phoenix, Arizona 85007
Phone: 602-364-3700
Fax: 602-364-3701
research@azot.gov
bbillings@azot.gov
Website: www.azot.gov
www.arizonaguide.com

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Janet Napolitano, **Governor**, State of Arizona

Margie Emmermann, **Director**, Arizona Office of Tourism

AnnDee Johnson, **Director of Research & Strategic Planning**, AOT

Melissa Elkins, **Research Manager**, AOT

Beth Billings, **Research Specialist**, AOT

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PAINTED CLIFFS WELCOME CENTER

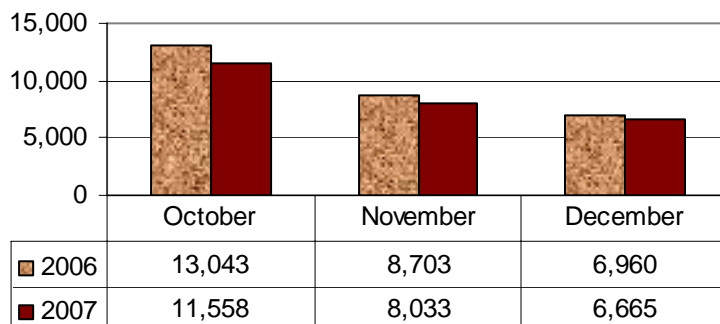


Painted Cliffs Welcome Center is located on Interstate 40, Exit #359-Grants Road in Lupton, Arizona

During the fourth quarter of 2007, there were a total of 26,256 visitors to the Painted Cliffs Welcome Center, a decrease of -38.4%, or 15,119 visitors, compared to the same period last year. This drop in visitation can be attributed to the decrease in visitors originating from the United States, which was down -38.4%, or 24,277 visitors, compared to the same period last year. The top five originating states were California, Texas, New Mexico, Arizona, and Colorado. In the fourth quarter, visitation from seven of the top 10 originating states decreased when compared to Q4 2006. Together, the top 10 originating states had a decline of -37.9%, or 8,506 visitors.

Visitors originating from a foreign country decreased, down -32.1% to a total of 1,640 visitors. Visitors to the welcome center from Canada increased 49.0% to 982 visitors during the 4th quarter compared to the same period last year. There was a decrease in visitation for those originating from Germany, reflecting an decrease of -69.5% to 91 visitors compared to the same period last year.

4th Quarter Painted Cliffs Visitation



Top 10 Originating States 4th Quarter 2007

1	California	-52.7%
2	Texas	-61.9%
3	New Mexico	-21.7%
4	Arizona	-56.7%
5	Colorado	67.2%
6	Michigan	1.0%
7	Illinois	-20.1%
8	Oklahoma	-44.3%
9	Minnesota	105.7%
10	Missouri	-52.3%

Quarterly visitation totals by state and by country of origin can be found at www.azot.gov.

Source: Painted Cliffs Welcome Center